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Advance Planning Document (APD)

Description:

Department of General Services (DGS), and Department of Finance (DOF) require a Feasibility Study Report (FSR) to get the State's approval for funding. However, the Advanced Planning Document (APD), which is required in order to receive federal funding, has similar information as the FSR so the project office may request these agencies accept the APD in lieu of the FSR.

The project office must prepare and submit an APD for approval by the federal Department of Health and Human Services (DHHS), in order to receive federal funding above the regulatory thresholds. The APD is submitted in two phases: the Planning APD (PAPD) and the Implementation APD (IAPD). If the project changes scope, approach, or has significant changes in cost or schedule, the project submits an APD update (APDU). APDUs are also required on an annual basis to status the current costs and timelines.

If the project is not eligible for federal funding, APDs are not required and the normal FSR and state budgeting process apply.

TIP The APD approval process can be very lengthy. Allow at least two to four months for the APD approval cycle that includes reviews by the project manager, HHSDC budget office, HHSDC's System Integration Division (SID), HHSDC director, state control agencies, and federal program organizations. [Click here](#) for an illustration of the typical approval process and timing.

TIP The IAPD may need to include staffing for the maintenance and operations (M&O) phase, depending on the federal requirements for the system and type of federal funding. Be sure to include adequate M&O staffing in the APD to avoid shortfalls during the M&O period.

References:

- [ACF State Systems APD Guide](#) (MS Word), Chapter II describes Planning APDs. Note that different areas of DHHS have different guidelines for APDs. Be sure to consult the appropriate federal organization.

Samples and Supporting Materials:

- [PAPDU for Child Support Automation Project](#) (pdf)
- [IAPDU for WDTIP 1999](#) (pdf)
- [IAPDU for WDTIP 2001](#) (pdf)



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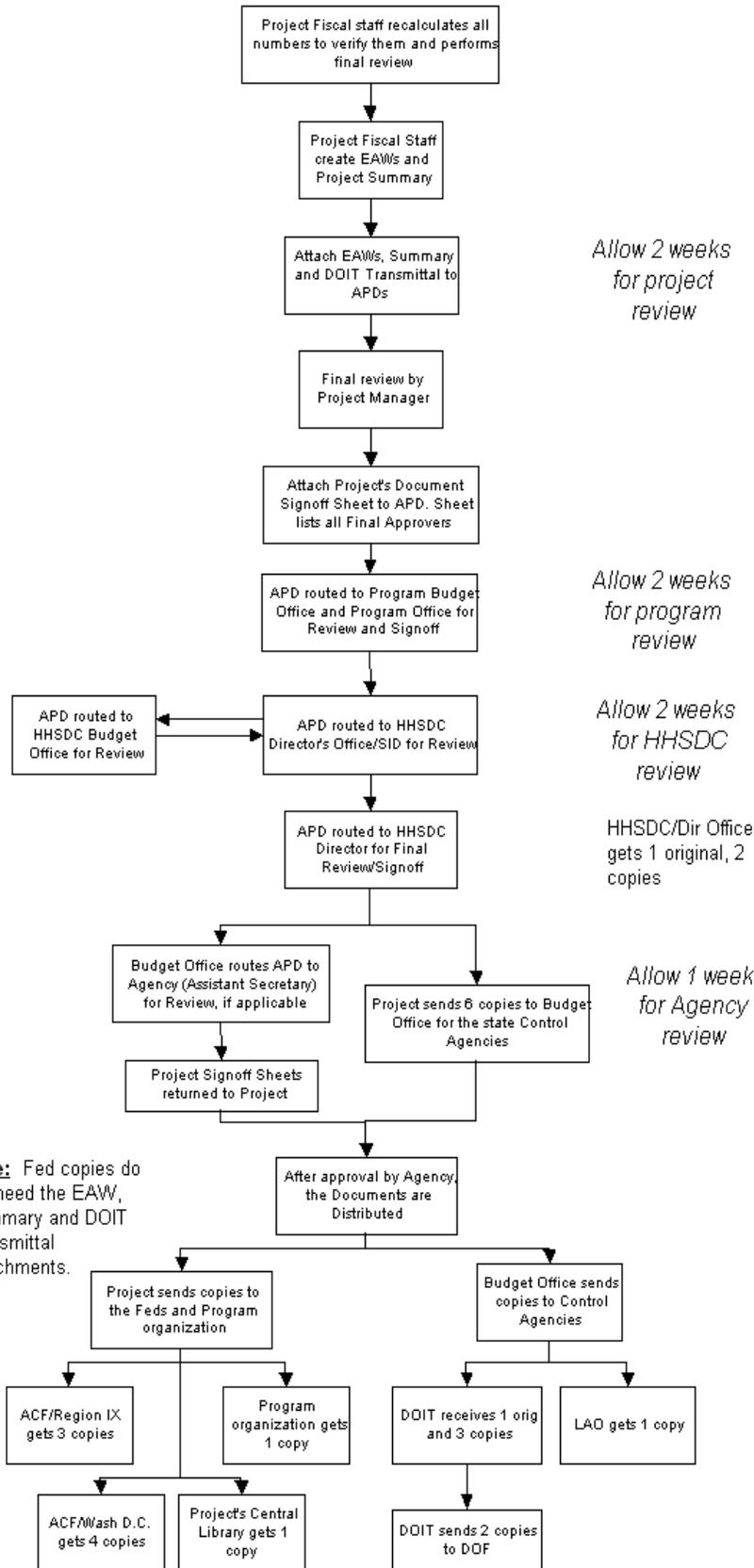
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APD Approval Process

The following represents a typical approval process. This is meant to provide general guidance only; consult your project's stakeholders to specific guidance.

APD Approval Procedures

This is the general flow for approving APDs. There have been exceptions where simultaneous reviews by state agencies/ departments have taken place.



Allow 2 weeks for project review

Allow 2 weeks for program review

Allow 2 weeks for HHSDC review

HHSDC/Dir Office gets 1 original, 2 copies

Allow 1 week for Agency review

Allow approx 120 days for DOIT review and approx 90 days for Federal review.

Section 11 review by the Legislature (for contracts over \$500,000) may add an additional 30 days after the DOIT review.